

Observation of Case Manager-Client Interaction

Agency: _____ Provider Type: (circle one) MCM PWI MCM/PWI

Staff Member Observed: _____ Date: _____

Person Conducting Observation: _____

Location and Type of Client Interaction Observed: _____

Client Initials _____ Client Medicaid Number _____

1. The case manager demonstrates appropriate rapport:	Y or N or N/A
a. Wearing name tag	
b. Greeting client and introduce self and observing staff	
c. Maintaining confidentiality*	
d. Explaining case management and provides client choice (when applicable)*	
2. The case manager demonstrates appropriate communication by:	
a. Communicating at client's level	
b. Addressing language and cultural issues (when applicable)*	
c. Working with client to identify needs and address problem areas*	
d. Using open ended questions	
e. Evaluating client's understanding of discussion items	
f. Demonstrating ability to problem solve with client	
3. The case manager provided appropriate referrals by:	
a. Giving choice of referral sources when choice is available.*	
b. Using support materials when giving information (i.e. referral forms, brochures, etc..)*	
c. Demonstrating adequate knowledge of community resources	
d. Following up appropriately on past referrals*	
4. The observed contact included all requirements for a billable visit. *	
5. Client/Guardian was allowed enough time to express needs and/or concerns	
6. The observed contact was individualized to the client.*	
7. The case manager maintains confidentiality of client records during transport in accordance with agency policy.*	

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Comments